

TO: Rich Camisa

DATE: October 26, 1989

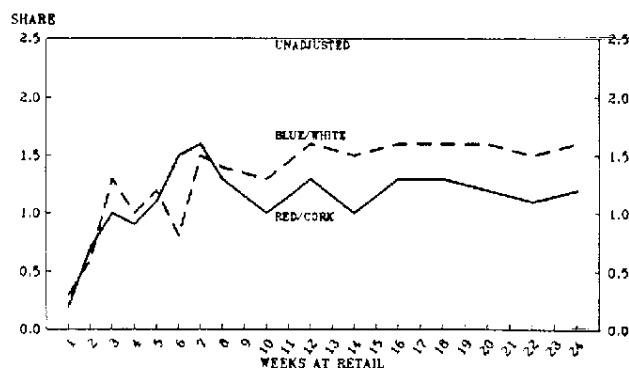
FROM: Marketing Information & Analysis/Dorothy Pisarski

SUBJECT: Marlboro Ultra Lights - Data Through 10/15

PORTLAND, INDIANAPOLIS

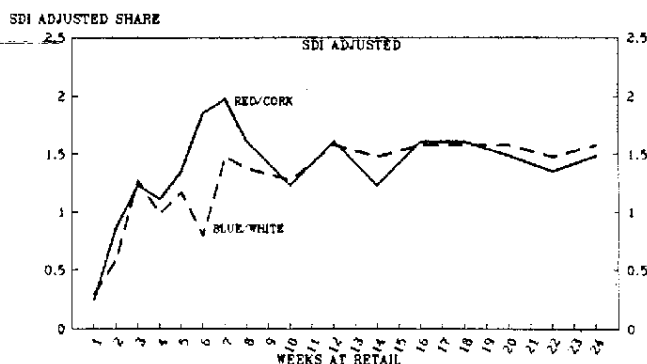
- Retail audit shares are 1.2 in Portland and 1.6 in Indianapolis for the two weeks ending 10/15 (test weeks 23 and 24).
- Adjusted shares are 1.5 in Portland and 1.6 in Indianapolis. Adjustments to shares are based on all brands identified as contributing to Marlboro Ultra Lights volume, and anticipate the brand's national performance level.

MARLBORO ULTRA LIGHTS  
INDIANAPOLIS (BLUE/WHITE) & PORTLAND (RED/CORK)  
RETAIL SHARES



SOURCE: RETAIL AUDITS

MARLBORO ULTRA LIGHTS  
INDIANAPOLIS (BLUE/WHITE) & PORTLAND (RED/CORK)  
RETAIL SHARES



SOURCE: RETAIL AUDITS AND CONSUMER TRACKING

- Preliminary InfoScan data for the week ending 10/1 present shares of 0.6 and 1.4 in Portland and Indianapolis, respectively.
- Factory shipments for the four weeks ending 10/15 are 0.6 in Portland and 0.9 in Indianapolis. The shipment shares to Indianapolis have been declining, and this is the first report of share less than 1.0 since week eight in this market.
- ICC shares for four weeks ending 10/08 are 0.5 in Portland and 1.2 in Indianapolis.
- Effective distribution is 92% in both markets for the two weeks ending 10/15.
- SPACE distribution through 10/8 is 97% in both Portland and Indianapolis.

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### NASHVILLE

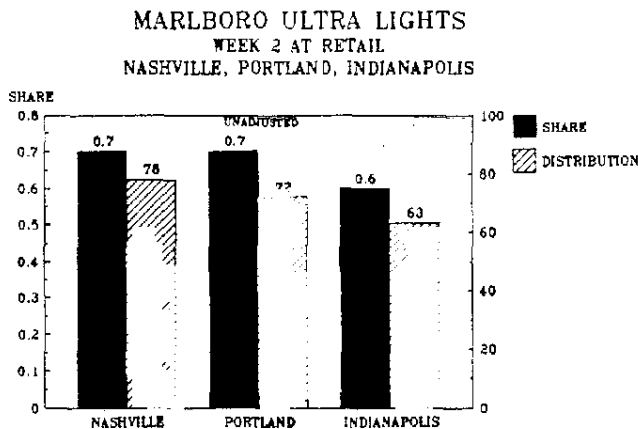
The third test market for Marlboro Ultra Lights began retail sales in Nashville on October 2. This test represents a third option for the Marlboro Ultra Lights product: a white tipped cigarette in a red chevron package.

In the Nashville market the total Marlboro SDI is 92, with Red's SDI at 89 and Marlboro Lights at 99. The Ultra Low category in Nashville has an 83 SDI, lower than in either of the other two test markets.

	<u>Nashville</u>	<u>Portland</u>	<u>Indianapolis</u>
Marlboro SDI	92	92	100
Marlboro Red SDI	89	88	96
Marlboro Lights SDI	99	79	111
Ultra Low SDI	83	106	101

### SUMMARY

- The preliminary retail audit share in Nashville is 0.7 for the second test week (w/e 10/15), which is comparable to the second test week's share in Portland (0.7) and Indianapolis (0.6) despite Nashville's lower share during week 1.
- Effective distribution in Nashville is 78% with 2% out-of-stocks, which is higher than Portland's 72% and Indianapolis' 63% during their second test weeks.



SOURCE: RETAIL AUDITS

- Factory shipment share is 2.6 in Nashville for the four weeks ending 10/22, which is higher than the 2.3 and 1.2 factory shipment shares in Portland and Indianapolis respectively during the same four week time period.

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DPi/mlk

MAUL11.DOC

DISTRIBUTION:

D. Alford	E. Houminer	S. Sabella
R. Anise	L. Johnson	T. Saloun
B. Baker	R. Kohl	B. Schuyler
T. Beane	J. Kuhlman	J. Scully
D. Beran	J. Lee	M. Serrano
S. Bloom	C. Levy	G. Smith
V. Buccellato	N. Lund	J. Spector
E. Butson	L. McCullagh	R. Stirren
J. Chaump	R. Medwar	L. Suwarna
C. Cohen	E. Merlo	R. Tomei
D. Dangoor	R. Mikulay	E. Van Dyke
K. Eisen	W. Murray	B. Weinstein
C. Finch	D. Potter	L. Wexler
H. Glastein	F. Resnik	J. Whitman
L. Glennie	J. Myracle	
A. Goldfarb	D. Nelson	
T. Goodale	B. O'Brien	
K. Houghton	M. Pfeil	

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## MARLBORO ULTRA LIGHTS

26-Oct

## PORTLAND (RED/CORK)

## INDIANAPOLIS (BLUE/WHITE)

W/E	RETAIL AUDITS					FACTORY SHIPMENTS				RETAIL AUDITS					FACTORY SHIPMENTS				4 WK	4 WK	4 WK	INFO/SCAN SHARE	SPACE DIST
	TOTAL SHARE	KINGS SHARE	100'S SHARE	% BTG1F	EFF DIST OOS	4 WK AVG SHARE	4 WK ICC SHARE	INFO/SCAN SHARE	SPACE DIST	TOTAL SHARE	KINGS SHARE	100'S SHARE	% BTG1F	EFF DIST OOS	4 WK AVG SHARE	4 WK ICC SHARE (COLUMBIA)	4 WK ICC SHARE (ALLIED)	4 WK ICC SHARE (McCONNELL)					
05/07	0.2	0.1	0.1	0	53(-)			0.0		0.3	0.2	0.1	0	53(5)						0.0			
05/14	0.7	0.3	0.4	13	72(-)	2.19		0.2	66	0.6	0.3	0.3	0	83(-)	1.40				0.2	67			
05/21	1.0	0.5	0.6	25	73(5)	2.26	0.9	0.2	80	1.3	0.5	0.5	15	88(15)	1.19	1.1			0.4	87			
05/28	0.9	0.5	0.4	7	74(5)	1.49	1.0	0.3	86	1.0	0.5	0.5	6	73(12)	1.30	1.5			0.4	89			
06/04	1.1	0.5	0.6	10	79(1)	1.38	0.8	0.4	89	1.2	0.7	0.5	17	74(7)	1.42	1.6			0.5	91			
06/11	1.5	0.7	0.8	5	88(1)	0.83	0.8	0.4	91	0.8	0.5	0.3	4	68(9)	1.47	1.4			0.7	87			
06/18	1.6	0.7	0.9	6	89(-)	0.37	0.8	0.5	93	1.5	0.8	0.7	19	73(9)	1.10	1.7			0.8	89			
06/25	1.3	0.6	0.7	12	88(-)	0.33	0.8	0.5	94	1.4	0.8	0.6	5	73(12)	0.88	1.7			1.1	94			
07/02						0.33	0.8	0.5	94						1.39	1.9			1.1	95			
07/09	1.0	0.5	0.5	4	89(4)	0.33	0.7	0.6	95	1.3	0.7	0.6	3	80(5)	1.43	1.8			1.2	96			
07/16						0.35	0.7	0.6	97						1.51	1.7			1.2	96			
07/23	1.3	0.6	0.7	-	89(3)	0.35	0.6	0.5	97	1.6	1.0	0.6	4	81(5)	1.68	1.6			1.1	98			
07/30						0.34	0.9	0.5	97						1.11	1.2	*0.8		1.2	96			
08/06	1.0	0.5	0.5	-	85(2)	0.53	0.8	0.5	97	1.5	0.9	0.6	-	89(1)	1.29	1.4	0.8		1.3	98			
08/13						0.56	0.8	0.5	97						1.27	1.5	0.7		1.2	98			
08/20	1.3	0.6	0.7	-	93(0)	0.60	0.8	0.6	97	1.6	0.9	0.7	-	90(1)	1.21	1.5	0.7	0.8	1.3	98			
08/27						0.60	0.5	0.9	98						1.28	1.5	0.7	0.8	1.6	97			
09/03	1.3	0.7	0.6	-	92(1)	0.51	0.5	0.9	98	1.6	0.9	0.7	-	86(2)	1.14	1.4	0.7	0.8	1.9	97			
09/10						0.52	0.5	0.8	98						1.19	1.3	0.9	0.9	1.7	98			
09/17	1.2	0.6	0.6	-	97(2)	0.56	0.5	0.7 (P)	98	1.6	0.9	0.7	2	90(5)	1.21	1.4	1.1	0.9	1.8(P)	97			
09/24						0.56	0.5	0.7 (P)	98						1.28	1.5	1.3	1.0	1.5(P)	97			
10/01	1.1	0.5	0.6	-	92(2)	0.51	0.5	0.6 (P)	97	1.5	0.7	0.6	-	91(2)	1.16	1.6	1.3	1.1	1.4(P)	97			
10/08						0.59	0.5		97						1.01	1.4	1.2	1.1		97			
10/15	1.2	0.6	0.6	-	95(2)	0.61				1.6	0.9	0.7	-	89(5)	0.91								
10/22																							
10/29																							
11/05																							
11/12																							
11/19																							
11/26																							
12/03																							
12/10																							
12/17																							
12/24																							

(P) PRELIMINARY

\* Data prior to 4 wks ending 7/30 are not available.

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MARLBORO ULTRA LIGHTS  
NASHVILLE (RED/WHITE)

26-Oct

RETAIL AUDITS

	TOTAL SHARE	KINGS SHARE	100'S SHARE	% B1G1F	EFF DIST/ OOS	FACTORY SHIPMENTS 4 WK AVG SHARE	4 WK ICC SHARE	INFOSCAN SHARE	SPACE DIST
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W/E									
10/8	0.2	0.1	0.1	0	66 (0)				
10/15	0.7 (P)	0.4	0.3	0	78 (2)	1.71			
10/22						2.62			
10/29									
11/5									
11/12									
11/19									
11/26									
12/3									
12/10									
12/17									
12/24									
12/31									

(P) PRELIMINARY

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